Transitions East 2018 will address:

- ‘Whole System’ Family Governance
- Succession Planning: What Works and What Doesn’t
- Women’s Changing Roles in the Family Business
- Why I Joined/Didn’t Join/Left the Family Business
- Managing Conflict to Workable Resolutions

TO LEARN MORE, AND REGISTER, visit:
www.familybusinessmagazine.com/te18

QUESTIONS ABOUT THE PROGRAM?
Contact Peter Begalla, Conference and Education Director, pbegalla@familybusinessmagazine.com or (386) 785-7856

Family Business
THE GUIDE FOR FAMILY COMPANIES
PRELIMINARY PROGRAM

WEDNESDAY, APRIL 11
2:30-6:30 p.m. Registration
3:30-4:30 p.m. Family Business Basics and Private Business Governance Best Practices
An optional, complimentary pre-conference session for first-time Transitions attendees and others who wish to brush up on key family business terms and practices. A special section has been added on private company governance/board best practices. The session will also offer tips on how to get the most out of the conference experience.

Speakers: David Karofsky, Consultant, The Family Business Consulting Group; Steven R. Walker, General Counsel & Managing Director, Board Advisory Services, National Association of Corporate Directors; Peter Begalla, Conference and Education Director, Family Business Magazine

4:30-5 p.m. Networking Break

5-6 p.m. ‘Whole System’ Family Governance
Panelists will describe the various governance bodies and governing documents that are in place in their company, the boundaries and intersections of each part of the family/business/ownership system and how the different parts work to ensure smooth functioning throughout the system.

Speakers: Kent Lundberg, Director, Lundberg Family Farms; John Reining, Chief Relationship Officer, The Clemens Family Corporation; Tamara Smith, Chair, Smith Family Council
Moderator: Charlie Carr, Managing Director, Family Enterprise Advisory Services, PwC

6:30-9 p.m. Welcome Reception and Dinner

THURSDAY, APRIL 12
7:30 a.m.-4:30 p.m. Registration Open
7:30-8:30 a.m. Breakfast
8:30-9:30 a.m. Succession Planning: What Works and What Doesn’t
A deep dive into the best practices for preparing and updating your succession plan. What should be the philosophical underpinnings of your plan? Have you set the tone for stewardship across your family and business? How do you start the process? Are you able to deal with unexpected leadership changes due to death or disability? As you think through succession, are you casting a wide enough net? Panelists will discuss their experiences in addressing these issues.

Speakers: Ross Born, Co-CEO, Just Born Quality Confections; Daniel Ariens, Chairman and CEO, Ariens Company; Letitia Hussey Beauregard, Chair of the Board of Directors, Hussey Seating Company
Moderator: Bryant W. Seaman III, Managing Director and Head of Private Asset Advisory, Bessemer Trust

9:30-10 a.m. Networking Break

10-11 a.m. Women’s Changing Roles in the Family Business
Thirty years ago, few women were seriously considered for key roles in their family or business — decisions were likely made by an authoritarian patriarch. Now, women are increasingly given room to step up. Our panel will discuss what has changed, and what still needs to change.

Speakers: Barbara Moran-Goodrich, Co-Founder, Chairwoman, CEO, Moran Family of Brands; Michelle Clements, President, Synergy Trust Company; Laura M. Neiman, President & CEO, Neiman Brothers Company Inc.
Moderator: Rhona Vogel, Founder and CEO, Vogel Consulting

11-11:15 a.m. Networking Break

11:15 a.m.-12:15 p.m. Expert Briefings

• Philanthropy — Creating a Family Legacy and Building Family Engagement: Kate Coughlin, Kellogg Center for Family Enterprises

For general questions on attendance or help with registration, please contact Justine Wood at (703) 850-5497 or jwood@familybusinessmagazine.com. All attendees will be verified prior to acceptance of registration. A family company’s advisers may attend only if accompanied by one or more family company members. Other family company advisers may contact Mike Bachman at (215) 405-6070 for information on attending.

CONFERENCE REGISTRATION RATES

Standard Pricing
$1,875: First attendee from your family company
$1,375: Each additional attendee (age 30+)
$1,150: Each additional Next Generation attendee (age 29 and under)

Members of families who have previously attended a Transitions conference receive a 10% discount on their cost of attendance. Your registration also includes a one-year subscription to Family Business Magazine or a one-year extension to your current subscription.

The Non-Family Executive and Family Relationships: F. Douglas Raymond, Drinker Biddle & Reath LLP

Marrying In and Dealing with Family Conflict: Blair Trippe, Continuity Family Business Consulting

Family History: Your Past as a Bridge to Planning Your Future: Jill Shipley and Mark Speltz, Abbot Downing

How to Keep the Family Business in the Family: Mike Pinkans and Greg Stevens, Capital Formation Counselors

Financial Readiness for Women: Diane K. Doolin, Morgan Stanley


Choosing or Changing a Family Wealth Adviser: Lynn Erskine and Erich Hickey, Drexel Morgan Capital Advisers

4:30-5 p.m. Intensive Workshops (select one)

Building the Best Family Meeting
This session will focus on great family meeting ideas and planning processes that promote engagement across the generations. Attendees will come away with a framework to plan and deliver family meetings that are fun and will promote clarity and cohesion across the whole family.

Session Leaders: Nancy Drozdow, Founder/Principal and Debbie Bing, President, CFAR

Creating a Family Development Plan
Family members can play many roles: as shareholders,
or working in the business at various levels, or participating in family or business governance, or other roles — and they all could use help in growing as effective members of the family and the business. This session will focus on creating plans to develop all family members, regardless of their role(s), and building the components of a systematic education and development program. Sample curricula will be provided, and discussion will focus on building and tracking the results of the family development plan.

Session Leader: Janice DiPietro, Founder and CEO, Exceptional Leaders International

Effective Mentoring in the Family Business
Preparing family members for the various roles and responsibilities in a family enterprise can be daunting. From the emerging family executive to the family champion and potential trustees, families must cultivate skills and talents that are rooted in the family values and principles while ensuring the technical competence is in firmly in place. A well-developed mentoring process helps families track and develop family members to steward the enterprise in their generation.

Session Leader: Andrew L. Busser, Managing Director of Strategy, Pitcairn

6:30-9 p.m. Family Dinner
Speaker: Andrew D. Pitcairn, Pitcairn Family Council Chair

FRIDAY, APRIL 13
7:30-8:30 a.m. Breakfast
8:35-9:35 a.m. Expert Briefings
Repeats sessions from Thursday
9:35-10 a.m. Networking Break
10-11:15 a.m. Managing Conflict to Workable Resolutions
Sometimes, conflict within a family business can seem irresolvable. But there are ways to leverage disagreements into stronger family bonds and better businesses. Panelists will discuss their experience with facing and managing complex family and business conflict.

Speakers: Heath Nunnemacher, Director, Galland Henning Nopak Inc.; Ralph Brennan, President, Ralph Brennan Restaurant Group
Moderator: Daisy Medici, Managing Director of Governance and Education, GenSpring

11:15 a.m.-12 noon Keynote Interview
Speaker: Andrew Cathy, Senior Vice President, Chief People Officer, Chick-Fil-A
Interviewed by Blair Trippe, Managing Partner, Continuity Family Business Consulting

12 noon-1:15 p.m. Lunch and Conference Close